

# Participant Screener Template

January 30, 2014

# Summary of Criteria

## Notes

*Define the number of participants, the areas and the market segments that are relevant for the screener. Summarize the key requirements for recruiting that are detailed in the body of the document. The text below is a sample from a real project.*

## INTRODUCTION (EXAMPLE)

Four participants will be recruited from

Five participants will be recruited from each of the following countries: UK, Germany, and France. Participants must own their own mobile phone, and must be the primary decision maker in the purchase of that mobile phone. The participants must be evenly divided among trendsetters who are design focused, trendsetters who are feature focused, premium seekers who are design focused, and premium seekers who are feature focused. Given the odd number of participants, there should be one from each group for each country, and the remaining three should be in different groups from each other.

Each participant must have either:

- 1) Purchased a new, high-end handset within the last month.
- 2) Be in the process of actively researching the purchase of a new handset, with firm plans to buy a new handset before the interview date.

The chart below shows an example distribution. As long as no cell has more than 2 participants, the exact distribution is not critical.

	Trend Setters	Premium Seekers		
	Design	Feature	Design	Feature
Country 1	1	1	1	2
Country 2	1	1	2	1
Country 3	1	2	1	1

The screener will cover the following topics:

- Time lived in current country
- Close association with marketing or survey work.
- Age
- Gender
- Past participation
- Household income
- Monthly phone bill
- Own a wireless phone
- Primary decision maker for purchase of that phone

- Phone usage: business or personal
- Frequency: 5 calls and 5 SMS per day
- Design/Fashion
- Actively shopping for a new phone/planning to buy a new phone in the next week.
- Amount of time they've owned their current phone.
- Number of phones used ever
- Current handset
- Occupation
- Full-time/Part-time

# Questionnaire – For Reference Only

## INTRODUCTION

### Notes

*The introduction sentence will be read by the recruiting agency when they call the customer. They will enter the amount of time that they estimate they need, so you may ignore that.*

Hello, I'm with \_\_\_\_\_ research company. We are gathering thoughts and opinions from mobile phone users, and would like to ask you a few questions. This will only take X minutes.

## QUESTIONS

### Notes

*The questions must be modified based on your project needs. We recommend starting with the quick screen questions, but you may find that your recruiting agency is using a pre-selected pool or panel of people. In this case they will often already know this information and will be able to skip this section.*

## QUICK SCREEN

1. Do you or anyone in your immediate family work for a marketing research company?

- ☐ Yes – Terminate  
☐ No – Continue

2. Do you or anyone in your immediate family work for a mobile phone company?

*[This includes handset manufacturers or retailers, and wireless carriers or retailers]*

- ☐ Yes – Terminate  
☐ No – Continue

3. Have you participated in a focus group or one-on-one interview within the last 6 months?

- ☐ Yes – Terminate  
☐ No – Continue

### Notes

*This section contains all your project-related criteria. The example here is from a real project and contains complicated logic skips to recruit people in the clients marketing segments. Most screeners are not this complex but we offer this as an example of how to structure logic skips.*

## CORE QUESTIONS

4. How long have been using a mobile phone? [Not necessarily their current one.]

- ☐ 6 months or less – Terminate
- ☐ 7 months to 2 years–Record and Continue
- ☐ More than 2 years – Record and Continue
- ☐ Do not own a mobile phone - Terminate

5. How many mobile phones do you actively use at the moment?

- ☐ 1 – Record and Continue
- ☐ 2–Record and Continue
- ☐ 3 or more – Record and Continue

6. Please tell me the name (make and model) of your phone(s).

7. Which of the following categories reflects the amount you spend each month on your wireless phone? (This is just their monthly bill, not counting the purchase price of a new handset).

- ☐ More than 50 GBP [50 Euro]–Record and Continue
- ☐ 36 to 50 GBP [36 to 50 Euro]– Record and Continue
- ☐ Less than 35 GBP [35 Euro] - Terminate

8. Are you the primary decision maker regarding the purchase of your mobile phone?

- ☐ Yes – Continue
- ☐ No –Terminate

9. Do you use your mobile phone for business or personal use?

- ☐ Business only – Terminate
- ☐ Personal and Business mixed–Record and Continue
- ☐ Personal only – Record and Continue

10. How often do you make or receive phone calls, and send or receive text messages each day?

- ☐ Less than 5 calls or less than 5 text messages – Terminate
- ☐ 5 or more calls and 5 or more text messages–Record and Continue

11. How long have you had your current mobile phone?

- ☐ Less than 1 month – Record and continue to question 13
- ☐ Between 1 month and 18 months – Record and continue to question 12
- ☐ More than 18 months – Terminate

12. Are you going to buy a new mobile phone in the next two weeks?

- ☐ Yes –Record and Continue
- ☐ No– Terminate

13. Please tell me the extent to which you agree with each of the following statements:

Premium	Agree	Neutral	Disagree
a. I'm always willing to pay a high price for something I really like.			
b. It's important that my phone express my personal style.			
c. I'm always aware that what I wear says a lot about who I am.			

d. It's important that my mobile phone reflect my taste in fashion.			
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If there are 3 Agrees, or 2 Agrees and no Disagrees, record as candidate for Premium and continue to question 15. Otherwise, proceed to question 14.

14. Please tell me the extent to which you agree with each of the following statements:

Trend Setter	Agree	Neutral	Disagree
e. People I know often ask for my opinion before buying a new mobile phone.			
f. The most important thing for me when I buy a new phone, is that it have the features I want.			
g. The mobile phones I buy always have the most advanced features.			
h. Among the people I know, I'm always one of the first to buy new technology.			

If there are 3 Agrees, or 2 Agrees and no Disagrees, record as candidate for Trend Setter and continue to question 15. Otherwise, terminate.

15. Generally, when you buy a product are you more sensitive to its functions or design?

☐ Functions – Record as possible candidate for “Feature” sub-group within category determined by question 24 or 25.

For Trend Setter, Feature go to 21.

For Premium, Feature go to 32.

☐ Design – Record as possible candidate for “Design” sub-group within category determined by question 24 or 25.

For Trend Setter, Design go to 16.

For Premium, Design go to 29.

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SEGMENT: TREND SETTER, DESIGN

*EACH PARTICIPANT ONLY ANSWERS ONE SET OF SEGMENT QUESTIONS.*

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16. Do you store music or photos files on your phone?

☐ Yes – Continue

☐ No – Terminate

17. Do you own and use a portable music player (e.g. iPod, Mp3 player...)?

☐ Yes – Continue

☐ No – Terminate

18. Do you use SMS or Instant Messaging (e.g. Msn Messenger, Skype, Twitter...) on a daily basis?

☐ Yes – Continue

☐ No – Terminate

19. Have you ever used Bluetooth or Wi-Fi (other than a Bluetooth headset) with your mobile phone, for example... wireless transfer of a photo or contact details?

☐ Yes – Continue

☐ No – Terminate

20. Participant has to answer “YES” to at least one of the following questions:

- Do you frequently use/manage personal online account(s) (e.g. Facebook, personal blog, Myspace, Linkedin, Flickr, Youtube, Hi5, Dopplr,...) ?
- Have you ever uploaded/shared photos or videos to a website (Flickr, Youtube, blog post...) ?
- Have you ever synchronized data between devices (e.g. synchronizing contacts and/or calendar between your phone and your computer, synchronizing your music from iTunes library to your iPod...)?
- Have you used GPS or other navigation-related services (e.g. a GPS navigator in your car or on your phone, Tom Tom, Garmin, Navman, Maps on the iPhone...) ?
- Do you own and use a Digital Video Recorder or a Video Gaming console ?
- Do you have a flat-rate mobile phone subscription (fixed monthly rate) that includes internet access ?

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SEGMENT: TREND SETTER, FEATURE

*EACH PARTICIPANT ONLY ANSWERS ONE SET OF SEGMENT QUESTIONS.*  
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21. Have you ever uploaded/shared photos or videos to a website (Flickr, Youtube, blog post...) ?

- ☐ Yes – Continue  
☐ No – Terminate

22. Do you own and use a Digital Television System or a Video Gaming console ?

- ☐ Yes – Continue  
☐ No – Terminate

23. Do you use Instant Messaging everyday (e.g. MSN Messenger, Skype, Twitter...) ?

- ☐ Yes – Continue  
☐ No – Terminate

24. How frequently do you use/manage personal online account(s) (e.g. Facebook, personal blog, Myspace, LinkedIn, Flickr, Youtube, Hi5, Dopplr,...) ?

- ☐ Once a week or more often – Continue  
☐ Less than once a week– Terminate

25. Have you ever used Bluetooth or Wi-Fi(other than a Bluetoothheadset) with your mobile phone, such as a wireless transfer of a photo or contact details for instance?

- ☐ Yes – Continue  
☐ No – Terminate

26. Have you ever used a handset to get local information in another city or country?

- ☐ Yes – Continue  
☐ No – Terminate

27. Have you ever paid for content on your mobile phone (music, TV, movies...) ?

- ☐ Yes – Continue  
☐ No – Terminate

28. Participant has to answer “YES” to at least one of the following questions:

- Have you ever synchronized data between devices (e.g. synchronizing contacts and/or calendar between your phone and your computer, synchronizing your music from iTunes library to your iPod...)?
- Have you used GPS or other navigation-related services (e.g. a GPS navigator in your car or on your phone, Tom Tom, Garmin, Navman, Maps on the iPhone...)?
- Do you store music or photos files on your phone?
- Do you own and use a portable music player (e.g. iPod, Mp3 player...)?
- Do you spend more than 1 hour on the Internet each day?
- Do you use online banking or online shopping?
- Do you have a flat-rate mobile phone subscription (fixed monthly rate) that includes Internet access?



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SEGMENT: PREMIUM, DESIGN

*EACH PARTICIPANT ONLY ANSWERS ONE SET OF SEGMENT QUESTIONS.*

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29. Do you spend more than 1 hour on the Internet each day?

- ☐ Yes – Continue  
☐ No – Terminate

30. Do you use online banking or online shopping?

- ☐ Yes – Continue  
☐ No – Terminate

31. Participant has to answer “YES” to at least one of the following questions:

- Do you use SMS or Instant Messaging (e.g. Msn Messenger, Skype, Twitter...) on a daily basis?
- Do you frequently use/manage personal online account(s) (e.g. Facebook, personal blog, Myspace, LinkedIn, Flickr, Youtube, Hi5, Dopplr,...)?
- Have you ever synchronized data between devices (e.g. synchronizing contacts and/or calendar between your phone and your computer, synchronizing your music from iTunes library to your iPod...)?
- Have you used GPS or other navigation-related services (e.g. a GPS navigator in your car or on your phone, Tom Tom, Garmin, Navman, Maps on the iPhone...)?
- Do you have a flat-rate mobile phone subscription (fixed monthly rate) that includes Internet access?

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SEGMENT: PREMIUM, FEATURE

*EACH PARTICIPANT ONLY ANSWERS ONE SET OF SEGMENT QUESTIONS.*

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32. Have you already used GPS or other navigation-related services (e.g. a GPS navigator in your car or on your phone, Tom Tom, Garmin, Navman, Maps on the iPhone...)?

- ☐ Yes – Continue  
☐ No – Terminate

33. Have you ever synchronized data between devices (e.g. synchronizing contacts and/or calendar between your phone and your computer, synchronizing your music from iTunes library to your iPod...)?

- ☐ Yes – Continue  
☐ No – Terminate

34. Have you ever used a handset to get local information in other city or country?

- ☐ Yes – Continue  
☐ No – Terminate

35. Have you ever paid for content on your mobile phone (music, TV, movies..) ?

- ☐ Yes – Continue  
☐ No – Terminate

36. Have you ever used Bluetooth- or Wi-Fi related functionality other than a (Bluetooth) headset with your mobile phone, such as a wireless transfer of a photo or contact details for instance?

- ☐ Yes – Continue  
☐ No – Terminate

37. Participant has to answer "YES" to at least one of the following questions:

- Do you use SMS or Instant Messaging (e.g. Msn Messenger, Skype, Twitter...) on a daily basis?
- Do you frequently use/manage personal online account(s) (e.g. Facebook, personal blog, Myspace, Linkedin, Flickr, Youtube, Hi5, Dopplr,...) ?
- Have you ever uploaded/shared photos or videos to a website (Flickr, Youtube, blog post...) ?
- Do you store music or photos files on your phone?
- Do you own and use a portable music player (e.g. iPod, Mp3 player...)?
- Do you spend more than 1 hour on the Internet each day?
- Do you use online banking or online shopping?
- Do you have a flat-rate mobile phone subscription (fixed monthly rate) that includes Internet access?

## Notes

*The demographic questions are at the end even though they could end up terminating an interview. The reason is that people are often reluctant to provide such personal data immediately, but once they've been in a long conversation they are more engaged and are less likely to refuse to tell us things like age and income.*

### ----- DEMOGRAPHICS -----

38. Let me know which of the following age categories you fall into:

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- ☐ Under 25 – Terminate
  - ☐ 26 to 35 –Record and Continue
  - ☐ 35 to 45 – Record and Continue
  - ☐ Over 45 – Terminate

39. Which of the following categories reflects your household income:

- ☐ 30,000 GBP [30,000 Euro] or less – Terminate
- ☐ 31,000 to 40,000 GBP [31,000 to 40,000 Euro]–Record and Continue
- ☐ 41,000 to 50,000GBP [41,000 to 50,000 Euro]– Record and Continue
- ☐ 51,000 to 60,000GBP [51,000 to 60,000 Euro]– Record and Continue
- ☐ Over 60,000 GBP [60,000 Euro] - Record and Continue

40. How many years of your life have you spent living in <UK, Germany, France>?

- ☐ Less than 15 years – Terminate
- ☐ 16 years or more –Record and Continue

41. Tell me what your occupation or job title is?

- ☐ Accounting/Finance
- ☐ Administrative/Clerical
- ☐ Business/Strategic Management
- ☐ Building Construction/Skilled Trades
- ☐ Creative/Design
- ☐ Customer Support/Client Care
- ☐ Editorial/Writing
- ☐ Engineering
- ☐ Food Services/Hospitality
- ☐ Human Resources
- ☐ Installation/Maintenance/Repair
- ☐ IT/Software Development
- ☐ Legal

- ☐ Logistics/Transportation
- ☐ Marketing/Product
- ☐ Medical/Health
- ☐ Production/Operations
- ☐ Project/Program Management
- ☐ Quality Assurance/Safety
- ☐ R&D/Science
- ☐ Sales/Business Development
- ☐ Security/Protective Services
- ☐ Student
- ☐ Training/Instruction/Teaching
- ☐ Other

42. Which of the following best describes your employment situation?

- ☐ Unemployed – Terminate
- ☐ Student – Terminate
- ☐ Full time employment – Record and Continue
- ☐ Part-time employment – Record and Continue

43. Please tell me about your favorite holiday or festival of the year and why you like it so much.

[This is merely a task to test the participant's articulation skills. Do they express their ideas clearly? Do they seem comfortable talking to a stranger? Are they easy to understand? If not, please terminate. Otherwise, continue to the agreement.]

## PARTICIPANT AGREEMENT

### Notes

*Provide the recruiting agency with text that they can use to explain the activity to the participant. Be sure to set participant expectations clearly here.*

Thank you for your time today. We would like to invite you to participate in a follow-up interview. If you choose to participate, you will be compensated for your time in the amount of XYZ.

We would like to visit you in your home and discuss your mobile phone usage and preferences, as well as your experience researching and shopping for a new phone.

[For those who have purchased a new phone already.] In particular, we'd like to hear about the experience you had transitioning from your old phone to your new phone.

[For those who are planning to purchase a new phone.] We hope you will purchase a new phone between now and the time of the interview. We'd particularly like to hear about the experience you had transitioning from your old phone to your new phone.

In preparation for the interview we ask that you keep a diary of your best and worst mobile phone related experiences each day. Tell us about the moments when you are happy or delighted with the mobile experience, and the moments when you are sad or angry. These moments might be triggered by the person who you are communicating with, by the phone itself, or by events that occur while you are researching and shopping for your new phone.

To make capturing these events easier, we encourage you to use the voice memo feature on your phone. Then you can listen to your comments each evening and write them down in your diary. When we visit your home, we'd like you to share the most significant moments from your diary. We will then take the diaries with us, so we can

review them in more detail.

After discussing your diary and other aspects of your mobile phone experience, we'd like to spend a bit of time hearing about your fashion and design preferences. To prepare for this, please select a few items whose aesthetic value you treasure. These items could be from your house, wardrobe, or car. We'd like to take a few pictures of the items and to hear what you like most about them.

Please be aware that we will record these sessions with a video camera, and will ask you to sign a consent form to this effect at the start of the session. Are you comfortable being recorded?

Please be assured that you will remain anonymous in all reports that result from this research.